

ITIL Problem Management Tool Guide

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ITIL Problem Manager

CD-doc-3523

Preparation Work

- Impact
- Urgency
- Operational Categorization (if set)
- Product Categorization
- Notes
- Summary

The screenshot shows the 'Incident Request Information' form. Annotations include:

- Blue arrows pointing to the 'Summary' and 'Notes' fields.
- Red arrows pointing to the 'Status', 'Impact', 'Urgency', 'Priority', and 'Weight' dropdowns.
- Green arrows pointing to the 'Operational Categorization' dropdowns (Tier 1+, Tier 2, Tier 3).
- Purple arrows pointing to the 'Product Categorization' dropdowns (Tier 1, Tier 2, Tier 3).

The form fields are as follows:

Incident Request Information			
Summary*	Needs VPN Activated	Status*	Assigned
Notes	User has vpn account and needs it	Impact*	3-Moderate/Limited
Escalated?	No	Urgency*	4-Low
		Priority*	Low
		Weight*	3
<div> <div><<</div> <div>Customer</div> <div>Contact</div> <div>Classification</div> <div>Work Info</div> <div>Tasks</div> <div>Assignment</div> <div>Vendor</div> <div>Relationships</div> <div>Resolution</div> <div>SLM</div> <div>Financials</div> <div>Date/System</div> <div>Suppo</div> </div>			
Incident Service Type		Operational Categorization	
Company*+	Fermilab	Tier 1+	
Service Type*	User Service Restoration	Tier 2	
		Tier 3	
Reporting Information		Product Categorization	
Reported Source		Tier 1	Classic IT Services
Reported Date+	9/2/2009 9:09:29 AM	Tier 2	Service Desk
		Tier 3	Service Desk Services
		Product Name+	
		Model/Version	
		Manufacturer	
		Clear	
<div>Save Print Close</div>			

(16.2.2, 16.2.3) Know some of the background, at least enough to describe the Problem. Can be from Notes and Summary fields plus any additional information from emails, documents, etc. Also contact department heads or group leaders of anyone you need as technical expert or for Root Cause Analysis if needed.

Creating a Problem Record 1

- New Problem

My Console

Search Criteria

Type: ALL | Select Status Values | Role: Problem Manager

Date: AnyTime | Search | Set to Defaults

Broadcast

0 entries returned - 0 entries matched | Preferences

Company	Subject	Priority	Start Date
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View | Create | Delete

Assigned Work

28 entries returned - 28 entries matched | Preferences | Refresh

ID	Summary	Request Type	Priority	Status	Status Reason	Assignee
SDB000000000043	Test Submission	Solution		Inactive		Gerald M Guglielmo
SDB000000000063	Mac OSX Office 2008 update failing	Solution		Active		Gerald M Guglielmo
SDB000000000073	TEST: 2nd ticket created to look at fields	Solution		Active		Gerald M Guglielmo
PKE000000000001	Test Submission	Known Error	Medium	Cancelled		
PKE000000000003	Test Submission	Known Error	High	Cancelled		Ken T Fidler
PKE000000000005	Intermittent failures of backups of rman file	Known Error	Medium	Scheduled For Correct		Ramon C. Pasetes

Flashboards

Select Flashboard | Total Open Problems

Total Open Problems

View | Create | Close | Quick Actions | Execute

(16.2.2) Creating a new problem

Creating a Problem Record 2

- Fermilab
- Computing Division
- CD-ProblemManagers
- Notes
- Summary

The screenshot shows a web-based form for creating a problem record. At the top, the 'Problem ID' is 'PBI000000000054'. Below this is a 'Process Flow Status' bar with steps: Identification and Classification (Normal), Review, Investigation and Diagnosis, Resolution and Recovery, and Closed. The 'Primary Information' section contains fields for Summary, Notes, Status, Impact, Urgency, Status Reason, Priority, and Weight. The 'Requester' section has fields for Requester Company, First Name, Middle Name, Last Name, Phone Number, Support Organization, and Support Group Name. The 'Problem Location Information' section has fields for Company, Region, Site Group, Site, and Address. Annotations include a blue arrow pointing to the 'Status' dropdown (set to 'Draft') and a green arrow pointing to the 'Requester Company' dropdown (set to 'Fermilab').

Problem ID*+ PBI000000000054

Process Flow Status

Identification and Classification Normal > Review > Investigation and Diagnosis > Resolution and Recovery > Closed

Primary Information

Summary* Needs VPN Activated Status* Draft Status Reason Priority* Weight*

Notes User has vpn account and needs it activated Impact* Urgency*

Requester Classification Work Info Tasks Assignment Vendor Relationships Date/System

Requester

Requester Company* Fermilab First Name*+ Gerald Middle Name M Last Name*+ Guglielmo Phone Number+ 1 630 840-6455 Support Organization* Computing Division Support Group Name* CD-ProblemManagers

Problem Location Information

Company*+ Fermilab Region Site Group FL Address Batavia, Illinois United States

Save Print Close

(16.2.2) Requester Company, Requester Organization, Requester Group Name should all be entered from the pull down menus

Creating a Problem Record 3

- Work Info Type
- Source
- Summary
- Details
- Add (if attachments)

Problem ID*+ PBI000000000054

Process Flow Status

Identification and Classification (Normal) > Review > Investigation and Diagnosis > Resolution and Recovery > Closed

Primary Information

Summary* Needs VPN Activated Status* Draft Status Reason
Notes User has vpn account and needs it activated Impact* Priority*
Urgency* Weight*

Requester Classification Work Info Tasks Assignment Vendor Relationships Date/System

Add Work Info

Work Info Type Working Log
Date
Source Email
Summary VPN account not activated on creation
Account created but it did not automatically get activate
Details

File Name	File Size	Attach Label
IMGrab1.tiff	122 KB	Attachment 1
		Attachment 2
		Attachment 3

Add

Locked No View Access External

Work Info History

Table has Not been Loaded Preferences Refresh

Type	Summary	Files	Submit Date
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View Report

Save Print Close

(16.2.2) Entering background and preliminary investigation information. Work Info Type and Source from the pull down menus. For Source, Email or other appropriate selection depending on how background information was collected.

Creating a Problem Record 4

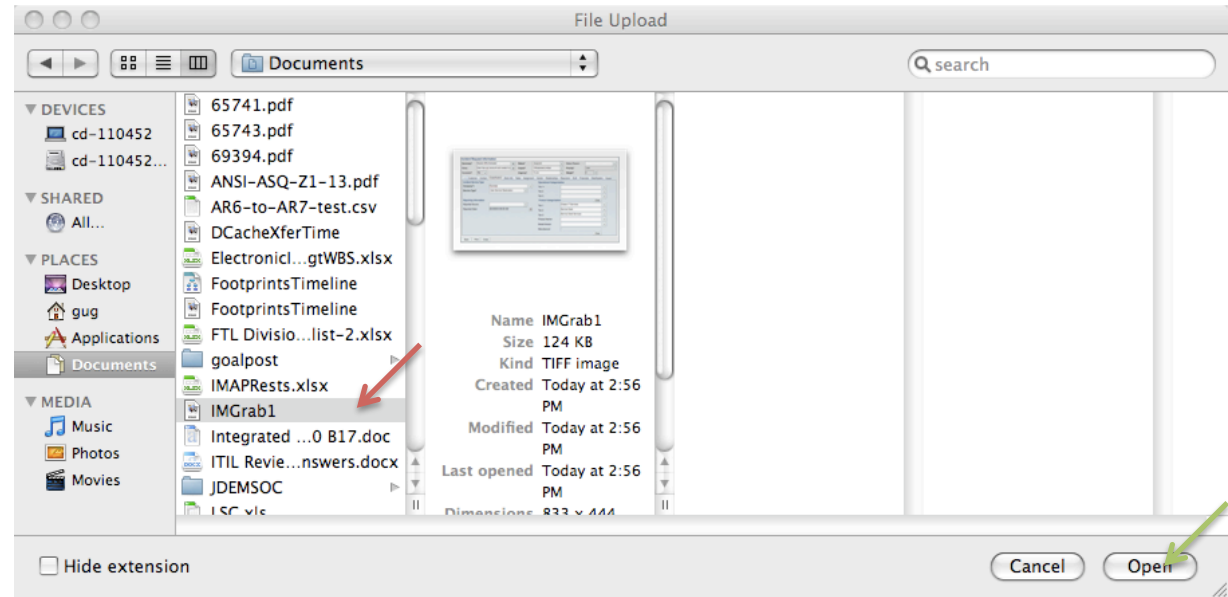
- Browse (first attachment)
- Browse (second attachment if needed)
- Browse (third attachment if needed)

The screenshot shows a web browser window with the title 'Add Attachment'. The address bar displays the URL 'https://ar-mtdev.fnal.gov/arsys/resources/html'. Below the address bar, there are three rows for adding attachments. The first row, 'Attachment 1', has a text field containing the file path '/Users/gug/Documents/IMGrab1.tiff' and a 'Browse...' button. The second row, 'Attachment 2', and the third row, 'Attachment 3', have empty text fields and 'Browse...' buttons. Colored arrows (red, green, and purple) point to the 'Browse...' buttons for Attachment 1, Attachment 2, and Attachment 3 respectively. Below the attachment fields is a 'Status' label and a large empty text area. At the bottom right of the dialog are 'OK' and 'Cancel' buttons. The bottom of the browser window shows a 'Done' button and the URL 'ar-mtdev.fnal.gov' with a lock icon.

(16.2.2) Browse to the files to attach. Note that up to 3 files can be attached per Work Info update. To add more attachments, separate the files into additional Work Info updates.

Creating a Problem Record 5

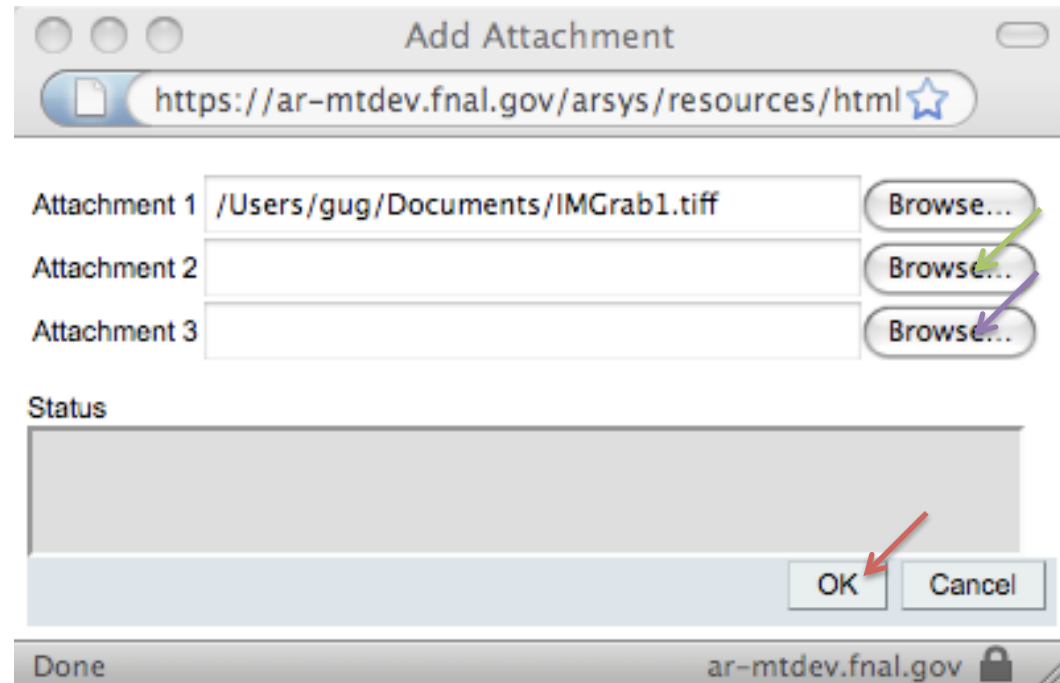
- Select (file to attach)
- Open (to confirm)



(16.2.2) Browse the filesystem for the file to attach. This view will vary based on operating system (OSX shown).

Creating a Problem Record 6

- Browse (second attachment if needed)
- Browse (third attachment if needed)
- OK (to attach the selected files to Work Info entry)



(16.2.2) Select up to two more files to attach and then click OK to add them to the Work Info entry in progress. Note that no files are actually added to the Problem record until the Save button on the Main area is clicked.

Creating a Problem Record 7

- Request Type (Incident)
- Search

The screenshot displays the 'Problem ID*+' field with the value 'PBI000000000054'. Below it is the 'Process Flow Status' bar with steps: Identification and Classification (Normal), Review, Investigation and Diagnosis, Resolution and Recovery, and Closed. The 'Primary Information' section includes fields for Summary* (Needs VPN Activated), Notes (User has vpn account and needs it activated), Status* (Draft), Status Reason, Impact*, Urgency*, Priority*, and Weight*. The 'Relationships' tab is active, showing a table with columns: Relationship Ty, Request Type, Request Summary, Status, Start Date, and End Date. The table is currently empty, displaying '0 entries returned - 0 entries matched'. At the bottom of the Relationships section, there is a 'Request Type' dropdown menu with 'Incident' selected. A red arrow points to this dropdown, and a green arrow points to the 'Search' button next to it. Other buttons include 'View', 'Remove', 'Create', 'Quick Action', and 'Execute'. At the very bottom are 'Save', 'Print', and 'Close' buttons.

(16.2.3) Associating Incident tickets with the Problem ticket. On the Relationships tab select Incident for Request Type from the pull down. Click on the Search button to open the Search window.

Creating a Problem Record 8

- Incident ID or Summary or Notes
- Select Incidents from list
- Relationship Type (Investigates)
- Relate

The screenshot shows the 'Incident Relationship Search' window. It has tabs for 'Search', 'Categorization', 'Assignment', 'Date Range and Location', and 'Contact and Customer'. The 'Search' tab is active, showing 'Basic Search' and 'Advanced Search' sections. Red arrows point to the 'Incident ID+' field (containing 'INC000000009614'), the 'Summary' field, and the 'Status' dropdown menu. Below the search criteria is a table of results. A green arrow points to the 'Status' column of the table. At the bottom, there are fields for 'The Current Request' (containing 'PBI000000000054'), 'Relationship Type' (a dropdown menu with 'Investigates' selected), 'The Selected Incident' (containing 'INC00000000009614'), and a 'Relate' button. A blue arrow points to the 'Relate' button. A purple arrow points to the 'Relationship Type' dropdown menu. A 'Close' button is at the bottom left.

Incident ID	Summary	Status	Status Reason	Company	Priority
INC000000009614	Needs VPN Activated	Assigned		Formilab	Low

(16.2.3) Enter search criteria in either the Incident ID field (need full Incident ID string) or a string in the Summary or Notes fields. Click on Search to retrieve matches. Click on displayed Incident from list to select, or Shift Click a second time to select a range of Incidents to associate. Set Relationship Type to Investigates from pull down and then click Relate to relate the Incident(s).

Creating a Problem Record 9

- Impact
- Urgency
- Organizational Categorization (Tier-1, Tier-2 & Tier-3)
- Product Categorization (Tier-1, Tier-2 & Tier-3)
- Save

Problem ID*+ PBI0000000000054

Process Flow Status

Identification and Classification (Normal) > Review > Investigation and Diagnosis > Resolution and Recovery > Closed

Primary Information

Summary* Needs VPN Activated Status* Draft Status Reason

Notes User has vpn account and needs it activated Impact* 3-Moderate/Limited Priority* Low

Urgency* 4-Low Weight* 3

Requester Classification Work Info Tasks Assignment Vendor Relationships Date/System

Problem Investigation Details

Investigation Driver* High Impact Incident

Investigation Justification

Target Resolution Date

Workaround

Root Cause

Reproducible

Operational Categorization

Tier 1+ Tier 2 Tier 3

Product Categorization

Tier 1 Classic IT Services Tier 2 Service Desk Tier 3 Service Desk Services

Product Name+ Model/Version Manufacturer

Save Print Close

(16.3.1, 16.3.2) On the Main Area add Impact and Urgency from pull down menus based on the Incident, use judgment if multiple Incidents with different settings. On Classification tab fill in the Organizational (if set in the Incident) and the Product Categorizations. Tier-1, Tier-2 and Tier-3 as necessary from the pull down menus. Click Save to place Problem in Draft status.

Creating a Problem Record 10

- Next Stage – Review from Flow bar menu
- Problem Manager Assignee (your name)

The screenshot shows a web-based form for creating a problem record. At the top, the 'Problem ID*' is 'PBI000000000054'. Below this is the 'Process Flow Status' bar, which has five stages: 'Identification and Classification', 'Review', 'Investigation and Diagnosis', 'Resolution and Recovery', and 'Closed'. The 'Review' stage is currently selected, indicated by a red arrow. Below the flow bar is the 'Primary Information' section, which includes fields for 'Summary*' (Needs VPN Activated), 'Notes' (User has vpn account and needs it activated), 'Status*' (Under Review), 'Impact*' (3-Moderate/Limited), 'Urgency*' (4-Low), 'Status Reason', 'Priority*' (Low), and 'Weight*' (3). Below this is the 'Assignment' tab, which contains two sections: 'Problem Manager Assignment' and 'Problem Assignment'. In the 'Problem Manager Assignment' section, the 'Support Company*' is 'Fermilab', the 'Support Organization*' is 'Computing Division', the 'Assigned Group*' is 'CD-ProblemManagers', and the 'Assignee' is 'Gerald M Guglielmo'. In the 'Problem Assignment' section, the 'Support Company' is 'Fermilab', the 'Support Organization' is 'Computing Division', the 'Assigned Group+' is 'Service Desk', and the 'Assignee+' is 'David E Schuman'. At the bottom of the form are 'Save', 'Print', and 'Close' buttons.

Placing Problem in Under Review status. Since all required information for this status has previously been entered, using the Next Stage from the flow bar menu and the Review from the sub-menu to advance the Problem record. Next under the Assignment tab set the Problem Manager Assignee to yourself from pull down menu and click Save.

Creating a Problem Record 11

- Problem Assignment Problem Assigned Group
- Problem Assignment Problem Assignee
- Click Save
- Next Stage - Investigation from Flow bar menu

Problem ID** PBI000000000054

Process Flow Status

Identification and Classification > Review > Investigation and Diagnosis > Resolution and Recovery > Closed

Primary Information

Summary* Needs VPN Activated

Notes User has vpn account and needs it activated

Status* Under Review

Impact* 3-Moderate/Limited

Urgency* 4-Low

Status Reason

Priority* Low

Weight* 3

Requester Classification Work Info Tasks Assignment Vendor Relationships Financials Date/System

Problem Manager Assignment

Support Company* Fermilab

Support Organization* Computing Division

Assigned Group* CD-ProblemManagers

Assignee Gerald M Guglielmo

Set Assignment using Set Clear

Problem Assignment

Support Company Fermilab

Support Organization Computing Division

Assigned Group+ Service Desk

Assignee+ David E Schuman

Set Assignment using Set Clear

Assign To Vendor* ☐ Yes ☒ No

Save Print Close

(16.4.1, 16.4.2) Investigate Problem. Problem Assignment Group and Assignee from pull down menus. Click Save. Advance to next stage, Under Investigation by using the Flow bar Next Stage menu and Investigation sub-menu item. The Problem is now Under Investigation.

Investigating a Problem 1

- Work Info Type
- Source
- Summary
- Details
- Add (if attachments)

The screenshot shows a web-based form for investigating a problem. The form is titled "Problem ID*+ PBI000000000054". Below the title is a "Process Flow Status" bar with steps: Identification and Classification (Normal), Review, Investigation and Diagnosis, Resolution and Recovery, and Closed. The "Primary Information" section includes fields for Summary, Notes, Status, Impact, Urgency, Status Reason, Priority, and Weight. The "Add Work Info" section has fields for Work Info Type, Date, Source, Summary, and Details. The "Work Info History" section shows a table with columns: Type, Summary, Files, and Submit Date. The table is currently empty, with a message "Table has Not been Loaded".

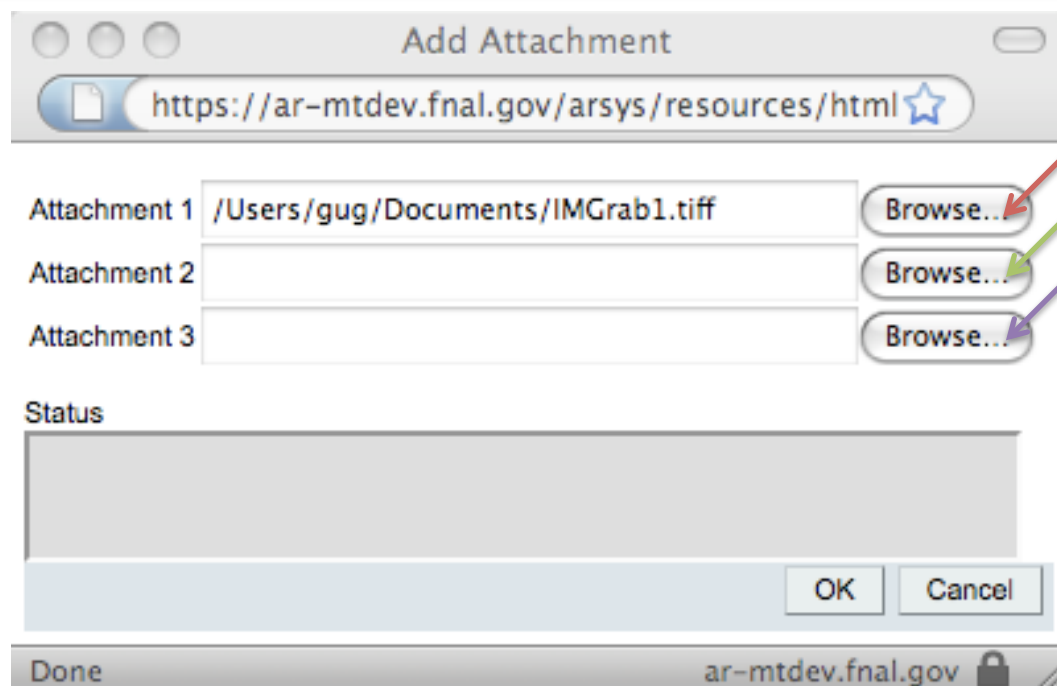
Annotations on the form:

- A red arrow points from the "Work Info Type" field to the "Working Log" dropdown menu.
- A green arrow points from the "Source" field to the "Email" dropdown menu.
- A green arrow points from the "Summary" field to the "VPN account not activated on creation" text.
- A green arrow points from the "Details" field to the "Account created but it did not automatically get activate" text.
- A purple arrow points from the "Add" button to the "Add" button.

(16.4.1, 16.4.2) Information gathered as part of the Problem Investigation and Diagnosis should be added to the Problem Record through the Work Info tab. Entering this information follows the same process as entering the preliminary and background information did when the problem record was being created. Work Info Type and Source should be selected from pull down menus.

Investigating a Problem 2

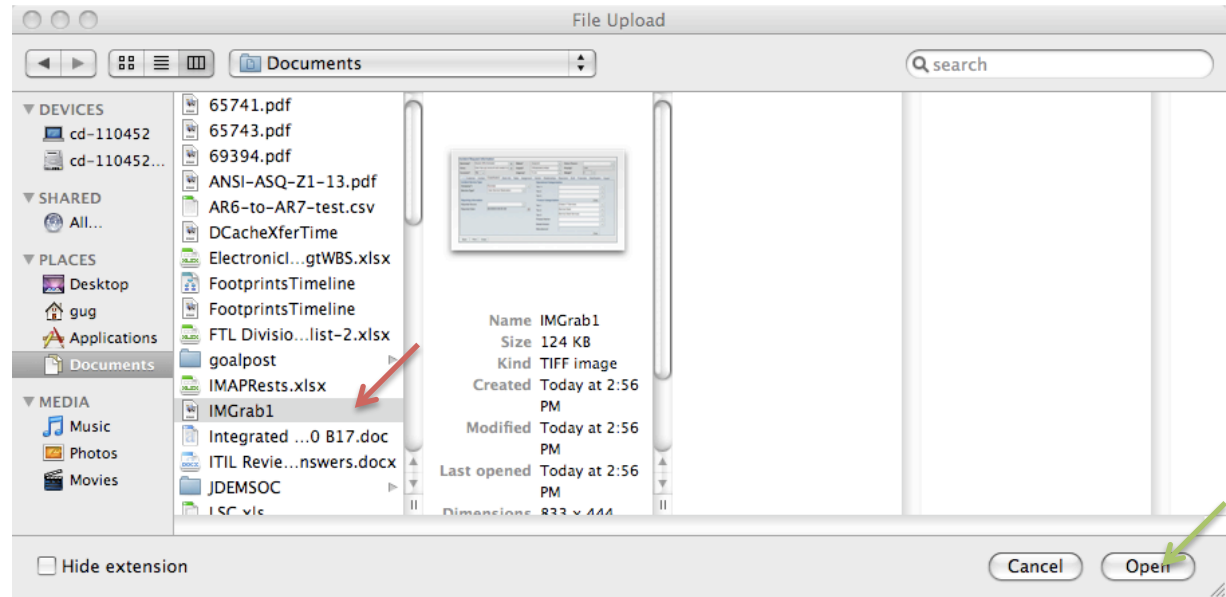
- Browse (first attachment)
- Browse (second attachment if needed)
- Browse (third attachment if needed)



(16.4.1, 16.4.2) Browse to the files to attach. Note that up to 3 files can be attached per Work Info update. To add more attachments, separate the files into additional Work Info updates.

Investigating a Problem 3

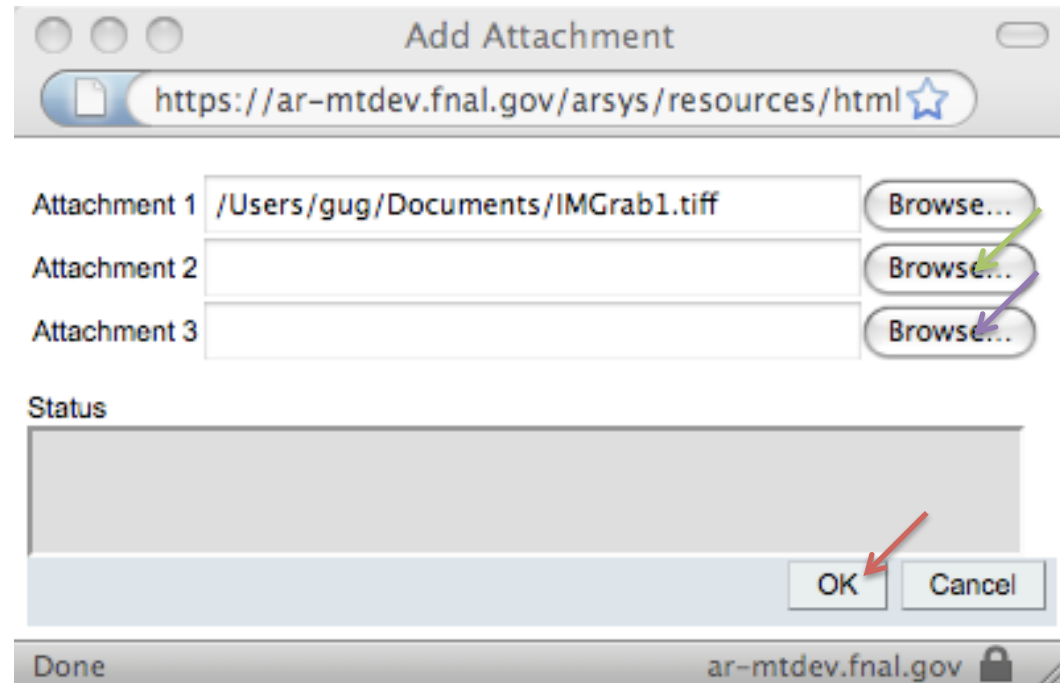
- Select (file to attach)
- Open (to confirm)



(16.4.1, 16.4.2) Browse the filesystem for the file to attach. This view will vary based on operating system (OSX shown).

Investigating a Problem 4

- Browse (second attachment if needed)
- Browse (third attachment if needed)
- OK (to attach the selected files to Work Info entry)



(16.4.1, 16.4.2) Select up to two more files to attach and then click OK to add them to the Work Info entry in progress. Note that no files are actually added to the Problem record until the Save button on the Main area is clicked.

Investigating a Problem 5

- Click Save

The screenshot shows a web-based interface for investigating a problem. At the top, the 'Problem ID' is PBI000000000054. Below this is a 'Process Flow Status' bar with steps: Identification and Classification, Review (Normal), Investigation and Diagnosis, Resolution and Recovery, and Closed. The 'Primary Information' section contains fields for Summary, Notes, Status (Under Review), Status Reason, Impact (3-Moderate/Limited), Priority (Low), Urgency (4-Low), and Weight (3). A tabbed interface below shows 'Requester', 'Classification', 'Work Info' (selected), 'Tasks', 'Assignment', 'Vendor', 'Relationships', 'Financials', and 'Date/System'. The 'Add Work Info' section has fields for Work Info Type (Investigation Findings), Date, Source (Other), Summary (Analysis report), and Details (Findings from the analysis of the log files and other info). There is an 'Add' button and a table for attachments. The 'Work Info History' section shows 1 entry returned, 1 entry matched, with a table containing columns Type, Summary, Files, and Submit Date. The entry is 'Working Log' with summary 'VPN account not activated on cres 1' and submit date '11/12/2009 3:18'. At the bottom, there are 'Save', 'Print', and 'Close' buttons. A green arrow points to the 'Save' button.

Type	Summary	Files	Submit Date
Working Log	VPN account not activated on cres 1		11/12/2009 3:18

(16.4.1, 16.4.2) Click the Save button on the Main area to add the Work Info entry.

Create Known Error Record 1

- Request Type
(Known Error)
- Create

Problem ID*+ PBI000000000054

Process Flow Status

Identification and Classification > Review > Investigation and Diagnosis > Resolution and Recovery > Closed

Primary Information

Summary* Needs VPN Activated

Notes User has vpn account and needs it activated

Status* Under Review

Impact* 3-Moderate/Limited

Urgency* 4-Low

Status Reason

Priority* Low

Weight* 3

Requester Classification Work Info Tasks Assignment Vendor Relationships Financials Date/System

Relationships

1 entries returned - 1 entries matched

Relationship Ty	Request Type	Request Summary	Status	Start Date	End Date
Investigates	Incident	INC000000009614: Needs VPN Activated	Assigned		

View Remove Request Type Known Error Search Create Quick Action Execute

Save Print Close

(16.5.1, 16.5.2, 16.5.3, 16.5.4) Need to identify Known Error and if it does not match an existing Known Error then create one. On the Relationship tab set Request Type to Known Error from pull down menu. Click Create to generate Known Error Record.

Create Known Error Record 2

- Notes (short error description)

Known Error ID* PKE000000000012

Primary Information

Summary* Needs VPN Activated

Status* Assigned

Status Reason

View Access* Internal

Searchable Yes

Impact* 3-Moderate/Limited

Urgency* 4-Low

Priority* Low

Weight* 3

Classification Work Info Assignment Vendor Tasks Relationships Resolution Date/System

Known Error Details

Company+ Fermilab

Notes* Creation of an account does not automatically activate account unless the Activate box is checked.

Category ☒ Bug ☐ Enhancement

Operational Categorization

Tier 1+ Tier 2 Tier 3

Clear

Product Categorization

Tier 1 Classic IT Services

Tier 2 Service Desk

Tier 3 Service Desk Services

Product Name+ Model/Version Manufacturer

Clear

Save Print Close

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Known Error Classification tab describe the error in the notes field (note 128 character limit).

Create Known Error Record 3

- Workaround (describe workaround)
- Root Cause (high level)
- Save

Known Error ID*+ PKE000000000012

Primary Information

Summary* Needs VPN Activated

Status* Assigned

Impact* 3-Moderate/Limited

Status Reason

Urgency* 4-Low

View Access* Internal

Priority* Low

Searchable Yes

Weight* 3

Classification Work Info Assignment Vendor Tasks Relationships Resolution Date/System

Temporary Workaround

Workaround Make sure Activate box is checked when creating accounts

Permanent Corrective Action

Resolution Update configuration of application to by default check Activate box.

Root Cause

*The root cause is driven by the Product Categorization from the Known Error Classification tab.

Root Cause Configuration Error

Corrective Model/Version

Patch Last Build ID

Pre-Release Date

General Availability Date

Save Print Close

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Known Error Resolution tab describe the workaround and select the best high level match for the Root Cause from the pull down menu. On the Known Error Main area click Save.

Create Known Error Record 4

- Request Type (Incident)
- Search

The screenshot shows a web application interface for managing Known Error Records. The main form is titled 'Known Error ID*' with a value of 'PKE0000000000012'. The 'Primary Information' section includes a 'Summary*' field with the text 'Needs VPN Activated'. Other fields include 'Status*' (Assigned), 'Impact*' (3-Moderate/Limited), 'Status Reason', 'View Access*' (Internal), 'Searchable' (Yes), 'Urgency*' (4-Low), 'Priority*' (Low), and 'Weight*' (3). Below this is a tabbed interface with tabs for 'Classification', 'Work Info', 'Assignment', 'Vendor', 'Tasks', 'Relationships', 'Resolution', and 'Date/System'. The 'Relationships' tab is active, showing a table with columns 'Relationship 1', 'Request Type', 'Request Summary', 'Status', 'Start Date', and 'End Date'. The table is currently empty, displaying '0 entries returned - 0 entries matched'. At the bottom of the 'Relationships' section, there is a 'Request Type' dropdown menu set to 'Incident', a 'Search' button, and a 'Create' button. A red arrow points to the 'Request Type' dropdown, and a green arrow points to the 'Search' button. There are also 'View' and 'Remove' buttons. At the bottom of the form, there are 'Save', 'Print', and 'Close' buttons. A 'Quick Action' section with a dropdown and an 'Execute' button is also visible.

(16.5.4) Associate Incidents with Known Error. On the Relationships tab set Request Type to Incident from pull down menu. Click Search.

Create Known Error Record 5

- Incident ID or Summary or Notes
- Select Incidents from list
- Relationship Type (Resolves)
- Relate

The screenshot shows the 'Incident Relationship Search' window. Red arrows point to the 'Incident ID+' field (containing 'INC000000009614'), the 'Summary' field, and the 'Status' dropdown menu. A green arrow points to the first incident in the 'Incidents' table. A purple arrow points to the 'The Selected Incident' field (containing 'INC000000009614'). A blue arrow points to the 'Relate' button.

Incident Relationship Search

Search Criteria

Search | Categorization | Assignment | Date Range and Location | Contact and Customer

Basic Search

Incident ID+ Impact
Summary Urgency
Status Priority
Orig/Dup Status Clear
Current Status

Advanced Search

Advanced Search

Search Clear All Note: The fields displayed in blue are not used within the Search Criteria. These fields are used to identify their respective ID values.

Incidents

Showing 1 - 1 of 1

Incident ID	Summary	Status	Status Reason	Company	Priority
INC000000009614	Needs VPN Activated	Assigned		Formilab	Low

View The Current Request Relationship Type The Selected Incident Relate
Close

(16.5.4) Enter search criteria in either the Incident ID field (need full Incident ID string) or a string in the Summary or Notes fields. Click on Search to retrieve matches. Click on displayed Incident from list to select, or Shift Click a second time to select a range of Incidents to associate. Set Relationship Type to Investigates from pull down and then click Relate to relate the Incident(s).

Problem Record for Known Error 1

- Workaround (describe workaround)
- Root Cause (high level)
- Reproducible

The screenshot shows a 'Problem Record' form for a 'Known Error'. The 'Problem ID' is PBI000000000054. The 'Process Flow Status' bar shows the current stage as 'Review' (Normal). The 'Primary Information' section includes fields for Summary, Notes, Status (Under Review), Impact (3-Moderate/Limited), Urgency (4-Low), Priority (Low), and Weight (3). The 'Problem Investigation Details' section has tabs for Requester, Classification, Work Info, Tasks, Assignment, Vendor, Relationships, Financials, and Date/System. The 'Investigation Driver' is set to 'High Impact Incident'. The 'Workaround' field contains the text 'Make sure Activate box is checked when creating accounts'. The 'Root Cause' is 'Configuration Error' and 'Reproducible' is 'Yes'. The 'Operational Categorization' section includes 'Tier 1+', 'Tier 2', and 'Tier 3' dropdowns, and 'Product Categorization' with 'Tier 1' (Classic IT Services), 'Tier 2' (Service Desk), and 'Tier 3' (Service Desk Services). Arrows point to the 'Root Cause' and 'Reproducible' fields.

(16.5.1, 16.5.2, 16.5.3, 16.5.4) On Problem Resolution tab describe the workaround, select the best high level match for the Root Cause from the pull down menu, and set Reproducible to Yes or No using the pull down menu.

Problem Record for Known Error 2

- Work Info Type (Investigation Findings)
- Source
- Summary
- Details
- Save

Problem ID*+ PBI000000000054

Process Flow Status

Identification and Classification > Review > Investigation and Diagnosis Normal > Resolution and Recovery > Closed

Primary Information

Summary* The addition of a Perl module to AFS

Notes The addition of the new Perl module to AFS perl v5.8 for Solaris to /afs/fnal.gov r/w

Status* Under Investigation

Impact* 3-Moderate/Limited

Urgency* 3-Medium

Status Reason

Priority* Medium

Weight* 13

Requester Classification Work Info Tasks Assignment Vendor Relationships Financials Date/System

Add Work Info

Work Info Type Investigation Findings

Date

Source Email

Summary Known error information

Details The problem has been identified as a known error in a

File Name	File Size	Attach Label
		Attachment 1
		Attachment 2
		Attachment 3

Add

Locked No View Access External

Work Info History

0 entries returned - 0 entries matched Preferences Refresh

Type	Summary	Files	Submit Date
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View Report

Save Print Close

(16.5.1, 16.5.2, 16.5.3, 16.5.4) Update the Work Info to include investigation findings, root cause, and text indicating known error. Set Work Info Type to Investigation Findings from pull down menu, and for Source chose an appropriate value from the pull down menu. Provide subject type information in Summary, and detailed text in the Details field. Click Save.

Known Error Utilize Workaround 1

- Status (No Action Planned)
- Save

Known Error ID*+ PKE000000000012

Primary Information

Summary* Needs VPN Activated

Status* Corrected

Status Reason

View Access* Internal

Searchable Yes

Impact* 3-Moderate/Limited

Urgency* 4-Low

Priority* Low

Weight* 3

Classification Work Info Assignment Vendor Tasks Relationships Resolution Date/System

Temporary Workaround

Workaround Make sure Activate box is checked when creating accounts

Permanent Corrective Action

Resolution Update configuration of application to by default check Activate box.

Root Cause

*The root cause is driven by the Product Categorization from the Known Error Classification tab.

Root Cause Configuration Error

Corrective Model/Version

Patch Last Build ID

Pre-Release Date

General Availability Date

Save Print Close

(16.5.6) If a workaround is to be employed instead of a solution, then the Known Error can have Status set to No Action Planned from the pull down menu. Click Save on the Known Error Main area.

Resolving Known Error 1

- Resolution
- Status (Corrected)
- Save

Known Error ID*+ PKE000000000012

Primary Information

Summary* Needs VPN Activated

Status* Corrected

Status Reason

View Access* Internal

Searchable Yes

Impact* 3-Moderate/Limited

Urgency* 4-Low

Priority* Low

Weight* 3

Classification Work Info Assignment Vendor Tasks Relationships Resolution Date/System

Temporary Workaround

Workaround Make sure Activate box is checked when creating accounts

Permanent Corrective Action

Resolution Update configuration of application to by default check Activate box.

Root Cause

*The root cause is driven by the Product Categorization from the Known Error Classification tab.

Root Cause Configuration Error

Corrective Model/Version

Patch Last Build ID

Pre-Release Date

General Availability Date

Save Print Close

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Add text describing the resolution and set the status to Corrected. In the Resolution field describe how the Known Error was resolved. Set the Status to Corrected from the pull down menu. Click Save.

Resolving Problem 1

- Work Info Type (Investigation Findings)
- Source
- Summary
- Details
- Next Stage - Resolution

The screenshot shows a web application for problem resolution. At the top, the 'Problem ID' is PB1000000000054. Below it is a 'Process Flow Status' bar with stages: Identification and Classification, Review, Investigation and Diagnosis (selected), Resolution and Recovery, and Closed. A purple arrow points to the 'Investigation and Diagnosis' stage.

The 'Primary Information' section contains fields for Summary, Notes, Status (Under Investigation), Impact (3-Moderate/Limited), Urgency (3-Medium), Status Reason, Priority (Medium), and Weight (13).

Below this is a tabbed interface with 'Work Info' selected. The 'Add Work Info' section has a 'Work Info Type' dropdown set to 'Investigation Findings' (indicated by a red arrow), a 'Date' field, a 'Source' dropdown set to 'Email' (indicated by a red arrow), a 'Summary' field, and a 'Details' field. A green arrow points to the 'Details' field. Below these are 'File Name', 'File Size', and 'Attach Label' fields with an 'Add' button.

To the right is a 'Work Info History' table with columns 'Type', 'Summary', 'Files', and 'Submit Date'. It shows '0 entries returned - 0 entries matched'. A green arrow points to the 'Type' column header.

At the bottom are 'Save', 'Print', and 'Close' buttons.

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Update the Work Info to include resolution, Major Problem or Post Implementation Review information. Set Work Info Type to Investigation Findings from pull down menu, and for Source chose an appropriate value from the pull down menu. Provide subject type information in Summary, and detailed text in the Details field. Click Save.

Resolving Problem 2

- Status (Known Error)
- Save

Problem Investigation Resolution

Enter information in this dialog box to move the problem investigation forward to the Resolution and Recovery stage.

Required Information Optional Information

Primary Information

Status Reason* Known Error

Product Categorization

Tier 1* Classic IT Services

Tier 2 Service Desk

Tier 3 Service Desk Services

Product Name+

Model/Version

Manufacturer

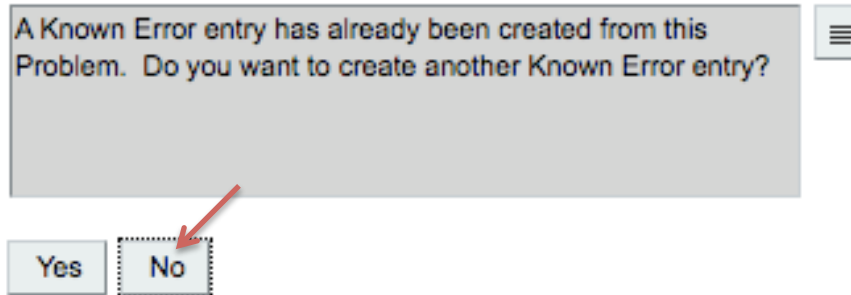
Clear

Save Cancel

(16.6.1, 16.6.2, 16.6.3, 16.6.4) Problem Resolution page should be in view. On the Required Information tab set the Status to Known Error from the pull down menu. Click Save.

Resolving Problem 3

•No



(16.6.1, 16.6.2, 16.6.3, 16.6.4) On the prompt page for creating an additional Known Error click No. The Problem now has a Status of Completed. Periodically go through and change Status to Closed from the pull down menu for Problem records listed as Completed.

Problem Management Processes

